

FIG. 2

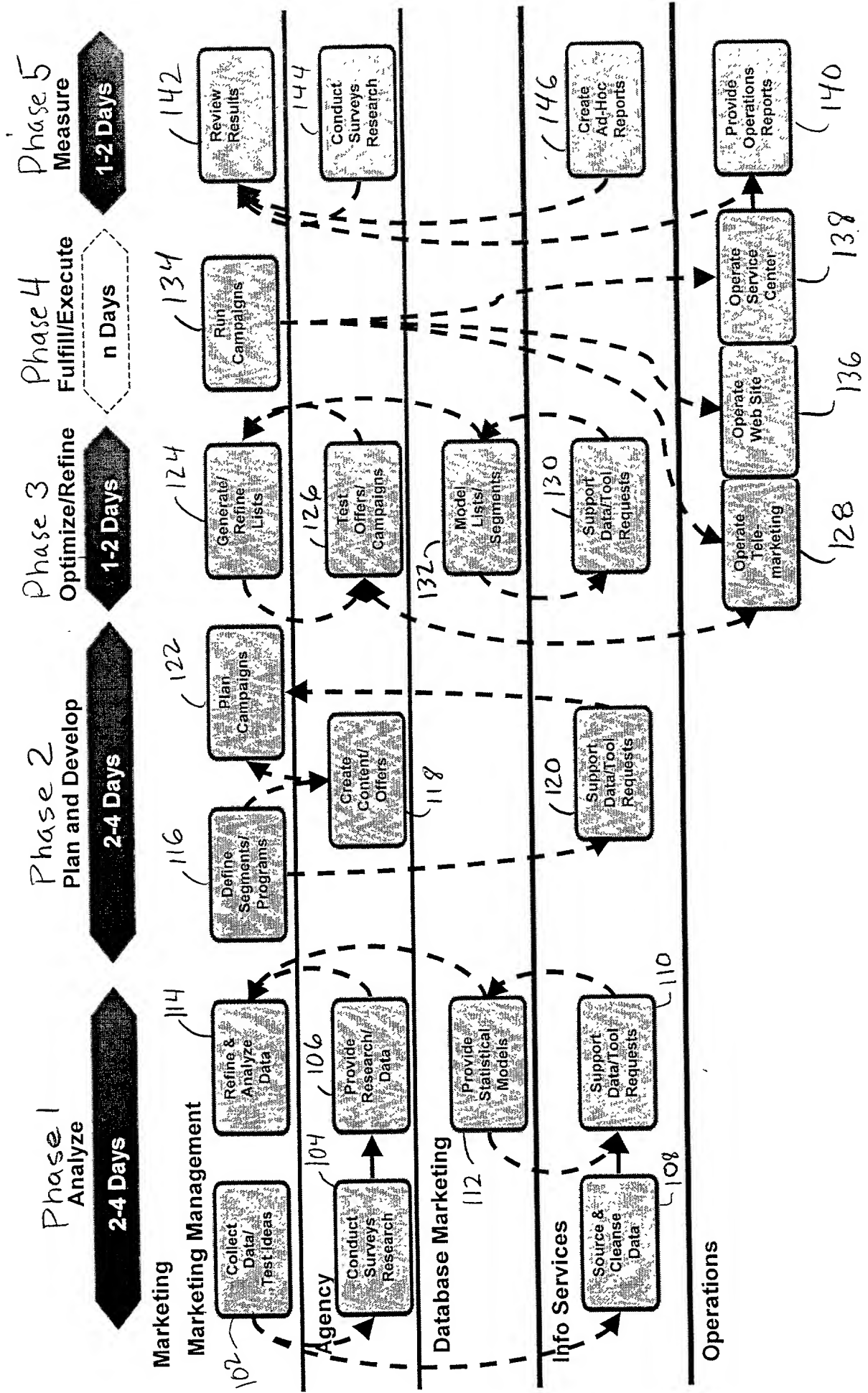


FIG. 3

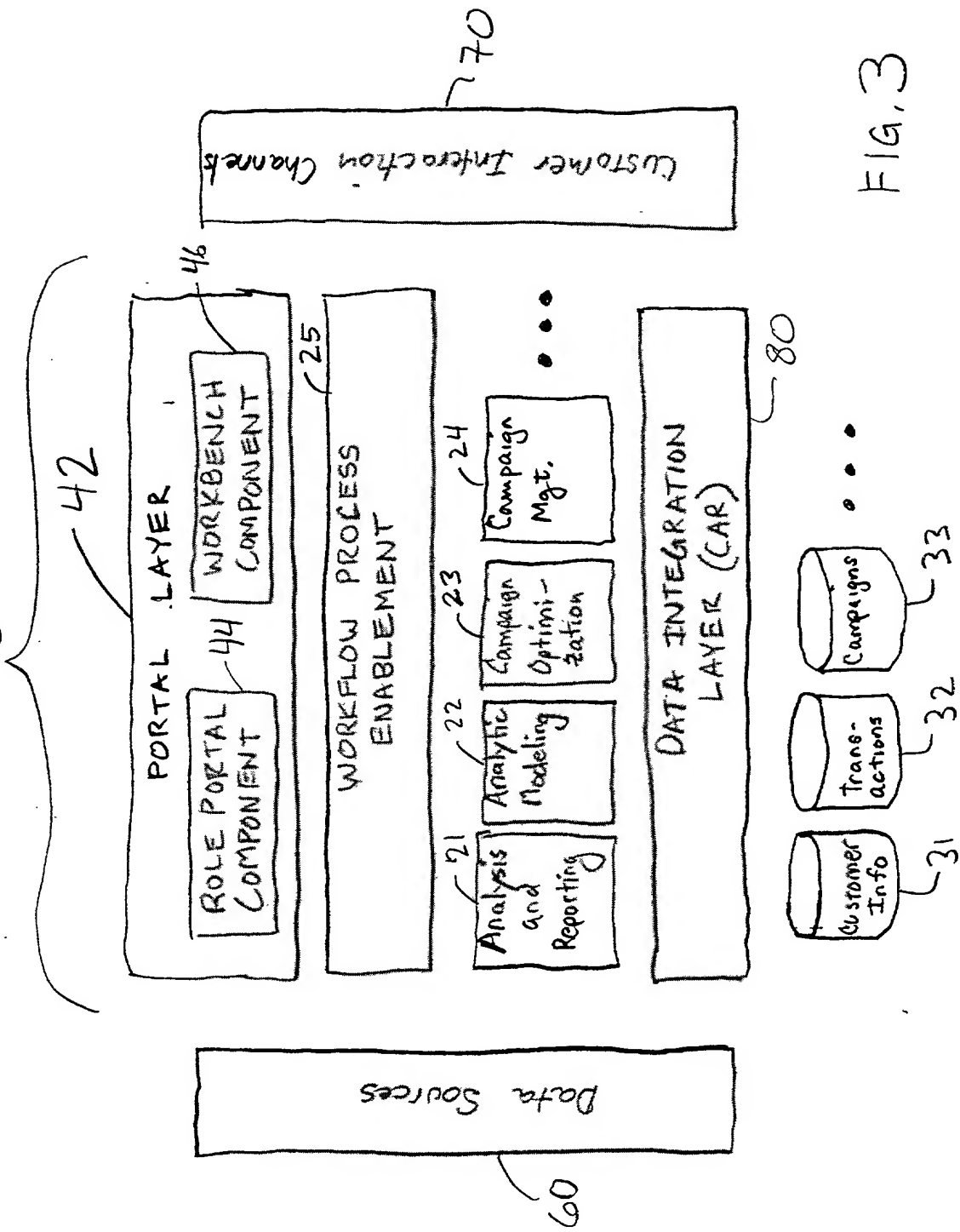


FIG. 3

FIG. 4

42

## PORTAL LAYER

44

### ROLE PORTAL COMPONENT

- EXECUTIVE
- MARKETING MANAGER
- DATA ANALYST

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•

•

46

### WORKBENCH COMPONENT

- HOMEPAGE
  - SCORECARDS
  - TASKS (TO DO'S)
  - ALERTS
  - COMPANY NEWS
  - OTHER NEWS
  - WEBSITE LINKS
- ACTIVITIES PAGE
  - TASKS (TO DO'S)
  - RESOURCES AND REFERENCES
- MARKETING CAMPAIGNS PAGE
  - S/W APP. ACCESS
  - CAMPAIGN INFO AND METRICS
- CUSTOMER ANALYSIS PAGE
  - S/W APP. ACCESS
  - ANALYTICS

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•



336

330

FIG. 6

332

356

350

352

354

accure Marketing Manager

Insight Driven Marketing

Home

Activities

Campaigns

Customer Analysis

Welcome, Administrator

Admin - My Account - Admin - Reports - Delivery - Help - Log Out

Retention

234

Loyalty Program Update

Retain High Value Singles

Retain High Value Families

Retain High Value DLINKs

Development

Grow Low Trans. Brokerage Accts.

Grow Average Trans. Value

Develop Day Trading Accts.

Acquisition

Cross Sell Family Home Loans

Cross Sell CC Customers

Retention Measures

Accounts Closed

Asset Retention %

Customer Retention Rate %

Customer Satisfaction %

Acquisition Measures

Avg. Acquisition Cost \$

Customers Acquired

New Avg. Profitability \$

Development Measures

# Accts per Cust.

Customer Active Accounts

Customers

Value

43,068

93

91

87

279

51,525

979

82

22

21

2

598,962

776,269

27

46

160

Target

45,000

90

90

80

200

50,000

750

90

20

25

2

500,000

750,000

20

40

150

Status

Quarter Two Earnings Statement

Advertising Age

CNN

The Weather Channel

Business Week

The Wall Street Journal

Research

Young Families Research

Families with Teens Research

Young Families Insurance Matrix

MEGAB

Filter: Maria Martinez

Insight Driven Marketing Activities

● Fall 2001 Marketing Strategy

● Understand Customers & Market

● Develop Customer Strategy

● Retention

● Development

● Acquisition

● Drive Loyal Behavior Among Ne

432

438

430

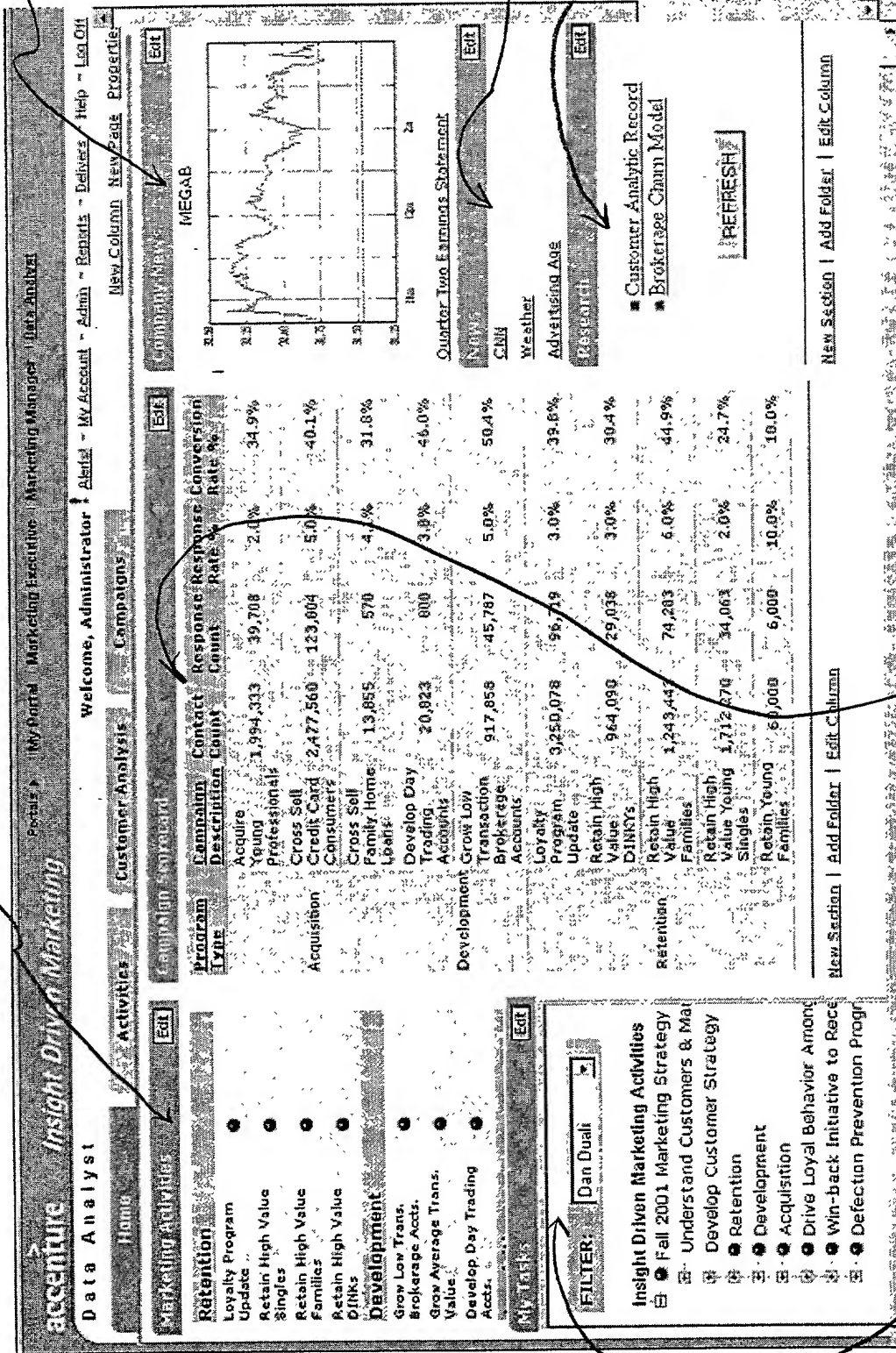
440

442

450

460

FIG. 7





R200 Business Objectives - KPI Report.doc

11/15/8



630

F/G. 9

770 774 760 772

730

FIG. 10

Accenture  
Marketing Manage  
Insight Driven Marketing

Home | Activities | Campaigns | Customer Analysis | New Column | New Rows | Properties

Welcome, Administrator | Alerts | My Account | Admin | Reports | Delivers | Help | Log Out

Campaign Selection Criteria

Promo Type

(All Choices)

Promo Description

(All Choices)

Channel

(All Choices)

Promo Date

Campaign History

Program Type	Campaign Description	Contact Count	Response Count	Response Rate %	Purchase Rate %	Conversion Rate %
Acquisition	Acquire Young Professionals	1,994,393	39,708	2.0%	0.7%	34.9%
Acquisition	Cross Sell Credit Card Consumers	2,477,560	123,804	5.0%	2.8%	40.1%
Acquisition	Cross Sell Family Home Loans	13,855	570	4.1%	1.3%	31.8%
Development	Develop Day Trading Accounts	20,823	800	3.8%	1.8%	46.0%
Development	Grow Low Transaction Brokerage Accounts	917,858	45,787	5.0%	2.5%	50.4%
Development	Loyalty Program Update	3,250,076	96,719	3.0%	1.2%	39.8%
Retention	Retain High Value DMKs	964,090	29,030	3.0%	0.9%	30.4%
Retention	Retain High Value Families	1,243,443	74,283	6.0%	2.7%	44.9%
Retention	Retain High Value Young Singles	1,712,270	34,053	2.0%	0.5%	24.7%
Retention	Retain Young Families	60,000	6,000	10.0%	1.0%	10.0%

New Section

Add Folder

Edit Column

830 The Customer 882

878

880

884

886

830

FIG. 11

File Edit View Favorites Tools Help

Accenture Insight Driven Marketing

Data Analyst

Home Activities

Launch Analytical Modeling Tool

Add an Analytical Report

Welcome, administrator

Alerts - My Account - Admin - Reports - Delivers - Help - Log Off

New Column New Page Properties

Key Metrics

Lifestage Segment	Total Product Count	Products per Customer	Total Assets	Total Profitability
Dinks	1,725,053	2.30	\$6,514,096,366	\$371,519,000
Empty Nesters	2,681,503	2.55	\$55,220,791,311	\$309,359,230
Families with Teens	2,401,192	2.40	\$26,206,477,560	\$348,602,730
Retired	2,701,490	2.70	\$38,686,516,090	\$245,735,795
Young Families	1,680,537	2.24	\$8,442,830,751	\$457,661,740
Young Singles	825,345	1.65	\$54,130,771	\$74,439,790

Demographics

Lifestage Segment	Average Age	Average Income	Average Family Size	% Married	% Male
Dinks	30.5	\$60,012	1.5	40.0%	55.1%
Empty Nesters	55.5	\$70,021	1.5	80.1%	45.0%
Families with Teens	46.5	\$65,023	3.5	90.0%	51.1%
Retired	79.5	\$45,020	1.5	80.1%	45.1%
Young Families	38.5	\$50,013	2.5	70.1%	52.1%
Young Singles	24.2	\$40,048	0.5	0.0%	65.1%

Psychographics

Lifestage Segment	% Fitness	% Outdoors	% Travel	% Domestic	% Cultural	% Bluechip	% Div	% Technology
Dinks	30.0%	29.9%	30.0%	10.0%	10.0%	40.0%	5.0%	29.9%
Empty Nesters	5.0%	20.0%	5.0%	25.0%	25.0%	10.0%	30.0%	4.9%
Families with Teens	10.0%	25.0%	10.0%	20.0%	20.0%	20.0%	20.0%	9.9%
Retired	5.0%	10.0%	5.0%	30.0%	30.1%	15.0%	15.0%	1.9%
Young Families	20.0%	29.9%	20.0%	15.0%	15.0%	30.0%	10.0%	19.9%

Please enter only the name of this folder of the Analytical Report that was created. (\*Required Field)

Rename or Delete a link.

\*Folder Name:

Folder Alias:

(If you would like to enter a more descriptive text for the link name)

Segment Overview

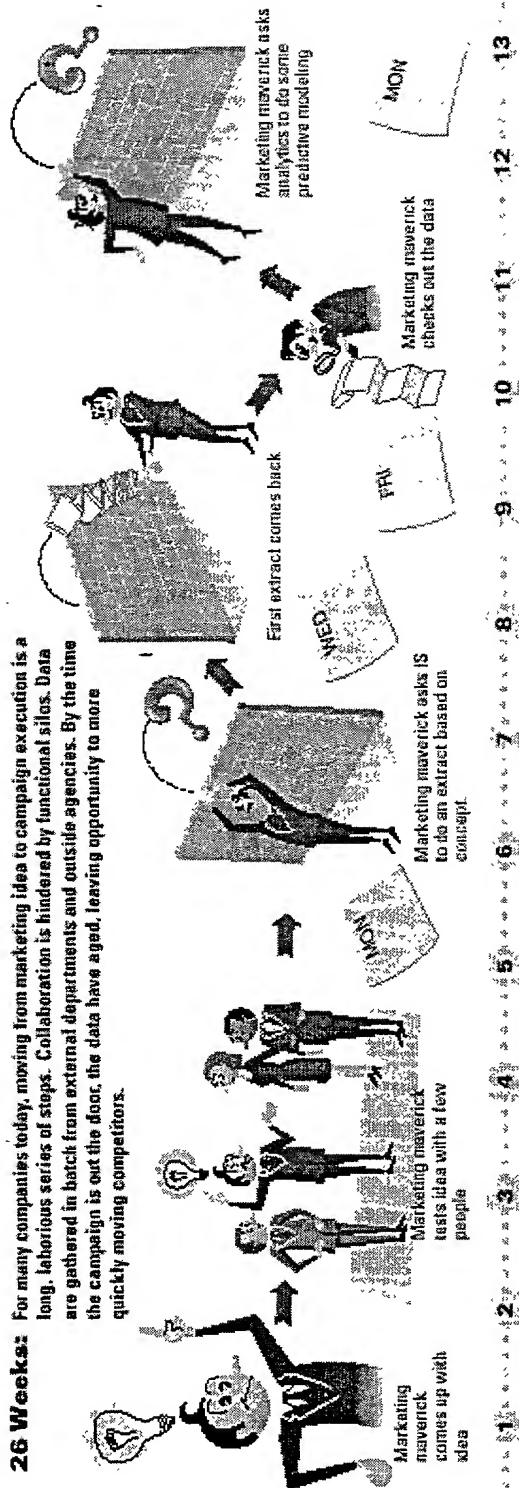
Customers by Segment

- Dinks
- Empty Nesters
- Families with Teens
- Retired
- Young Families
- Young Singles



# ANATOMY OF A MARKETING CAMPAIGN: THEN AND NOW

**26 Weeks:** For many companies today, moving from marketing idea to campaign execution is a long, laborious series of steps. Collaboration is hindered by functional silos. Data are gathered in batch from external departments and outside agencies. By the time the campaign is out the door, the data have aged, leaving opportunity to more quickly moving competitors.



**26 Minutes:** Gathered in a quality circle, the cross-functional marketing team views analysis of real-time data, brainstorm ideas, and assigns responsibilities. With integrated tools and data at their fingertips, they are able to move quickly, employing technology to integrate customer data, content, and fulfillment to deliver the marketing campaign—getting it right the first time.

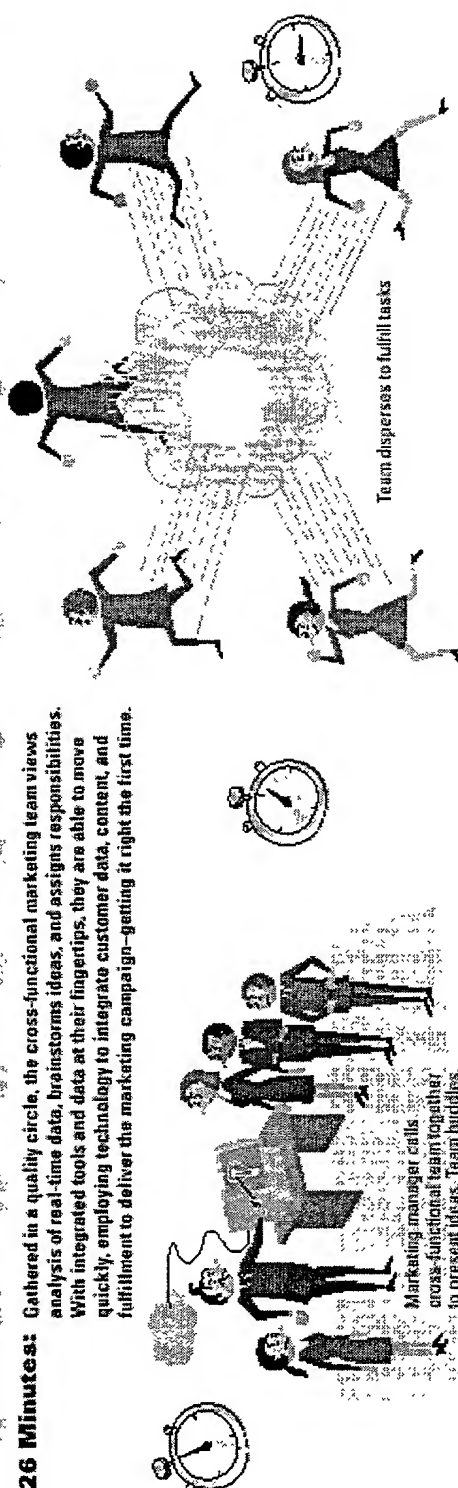




FIG. 13B

